Overview – Solution Package „generic Action Item vX “

- Many times when creating a custom workflow and its form in Aras Innovator or when extending existing processes there can be a requirement to have sub-workflows to follow-up on additional actions or “ToDo’s”. Of course, these sub-workflows then have to be created “ad-hoc”. A common way here is to add a relationship listing actions to do and there point to an item with a workflow, so it shows you the InBasket of an action’s owner.

- This solution package will exactly address this. The new “generic Action Item” type is designed to be re-used whenever you want additional Actions listed on a process’ form. (this idea was inspired by the existing community solution for “meeting minutes” on projects)

- An example how this additional functionality can be re-used, once imported, is also part of this package. Adding an “Action Items” tab to the standard “Express DCO”

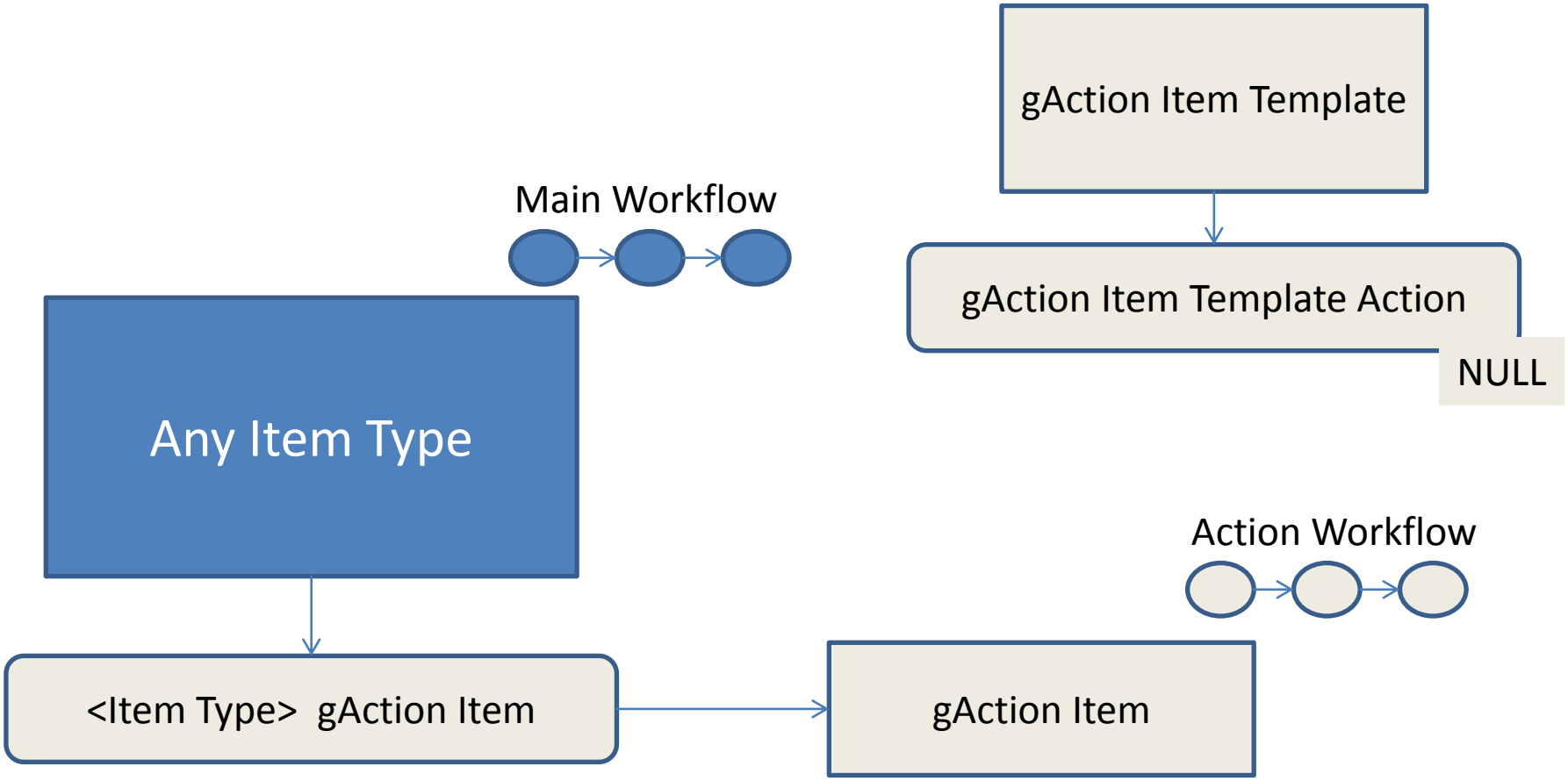
- A second new item type „gAction Item Template“ is used to allow managing a set of „standard Actions“ (by Administrator for example) that will „instantiate“ triggered from your process on which you added the „Action Items“ tab. (Trigger can be a custom action, like in the expample, or by custom logic using the Aras Innvator API)

Installation

- Use the Aras PackageImportExportUtilities to import the package „generic Action Item vX “
- There are multiple import cycles you have to do in exactly this order.
- Log in as „admin“ and use „merge“ option for all steps
- Folder: 1-Import - Generic Action Item Functions
  - Import: “generic Action Item”
- Folder: 2-Import - Example on DCO (optional)
  - 1-Import: „generic Action Item - on Express DCO”
  - 2-Import: “PLM” (adds new action to DCO)

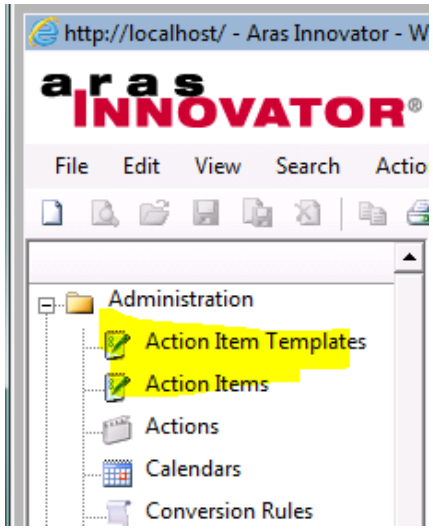
  → You MUST use the „Merge“ option.
- Done

Data Model

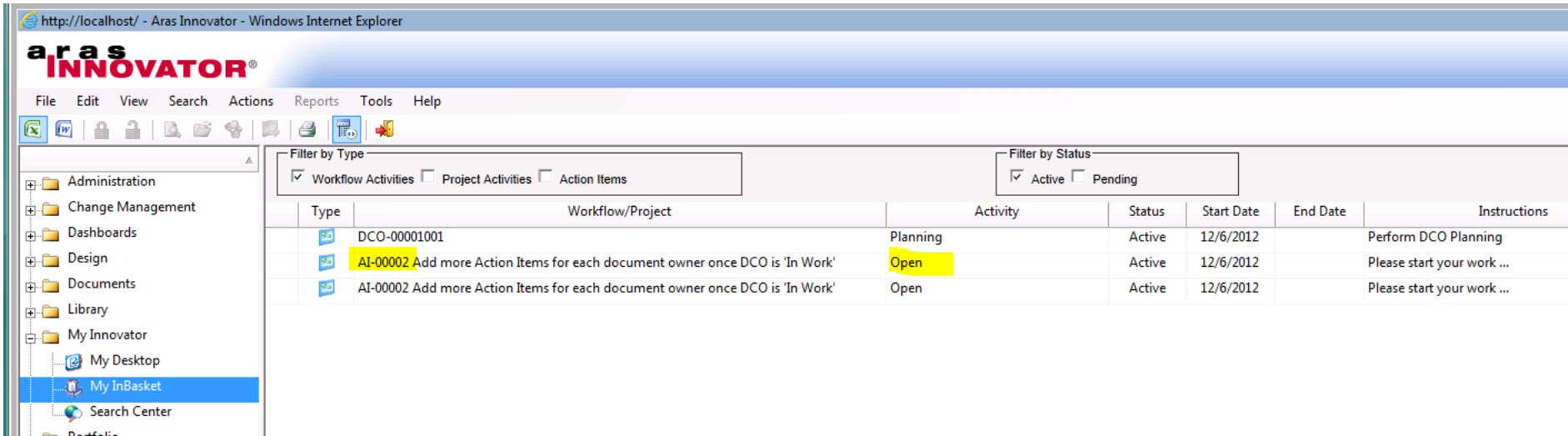

gAction Item Template
Main Workflow
gAction Item Template Action
NULL
Any Item Type
Action Workflow
<Item Type> gAction Item
gAction Item

Working with Action Items

Access to Action Items and Templates for „Administrators“

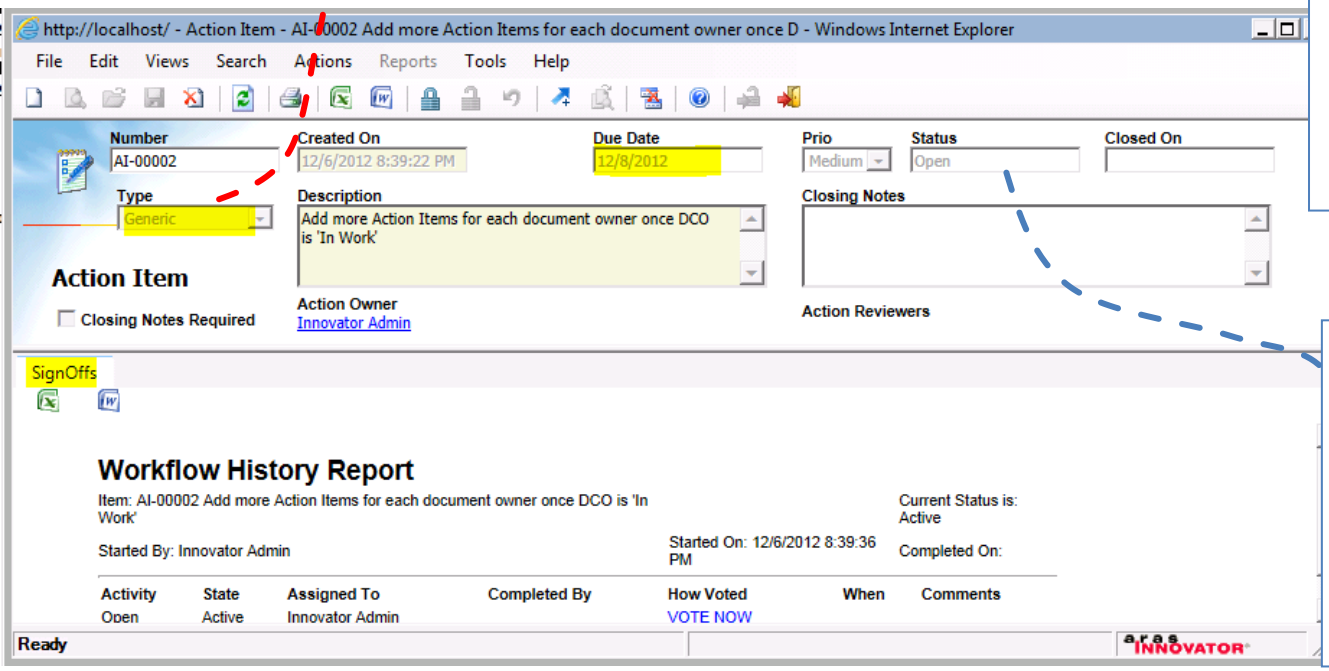


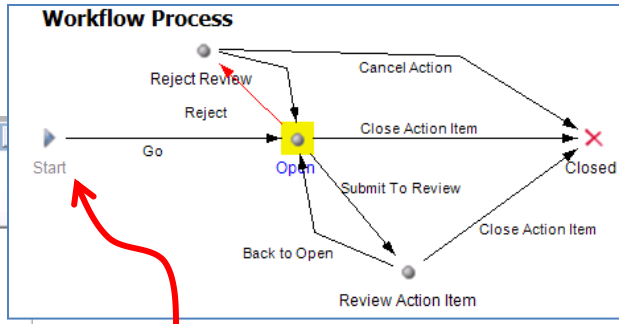
Access to Action Items via InBasket for all users



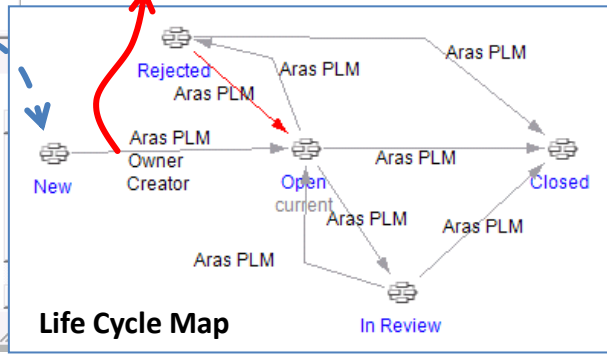
gAction Item – ItemType, Life Cycle Map, and Workflow Map

Use List „ gAction Item Types“ to add your types





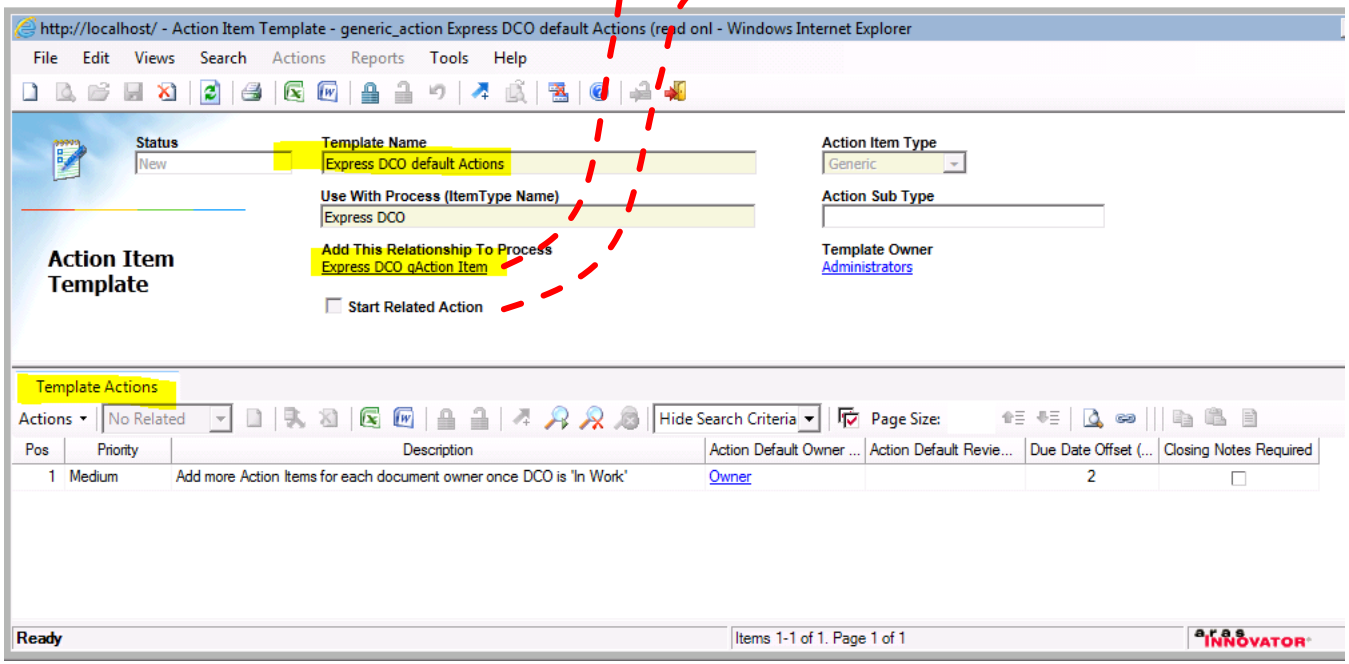
Transaction starts the workflow



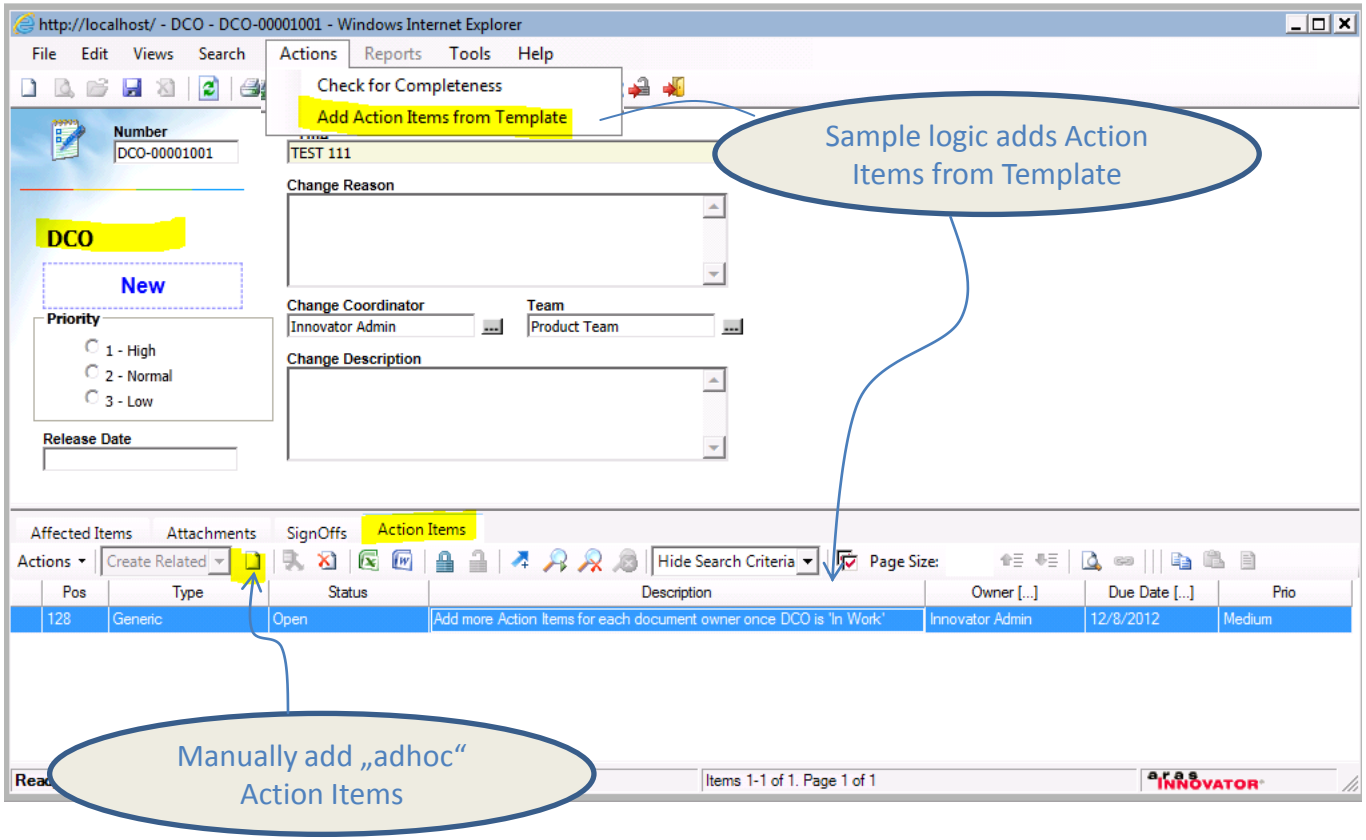
„gAction Item Template“

Valid RelationshipType you added to your process

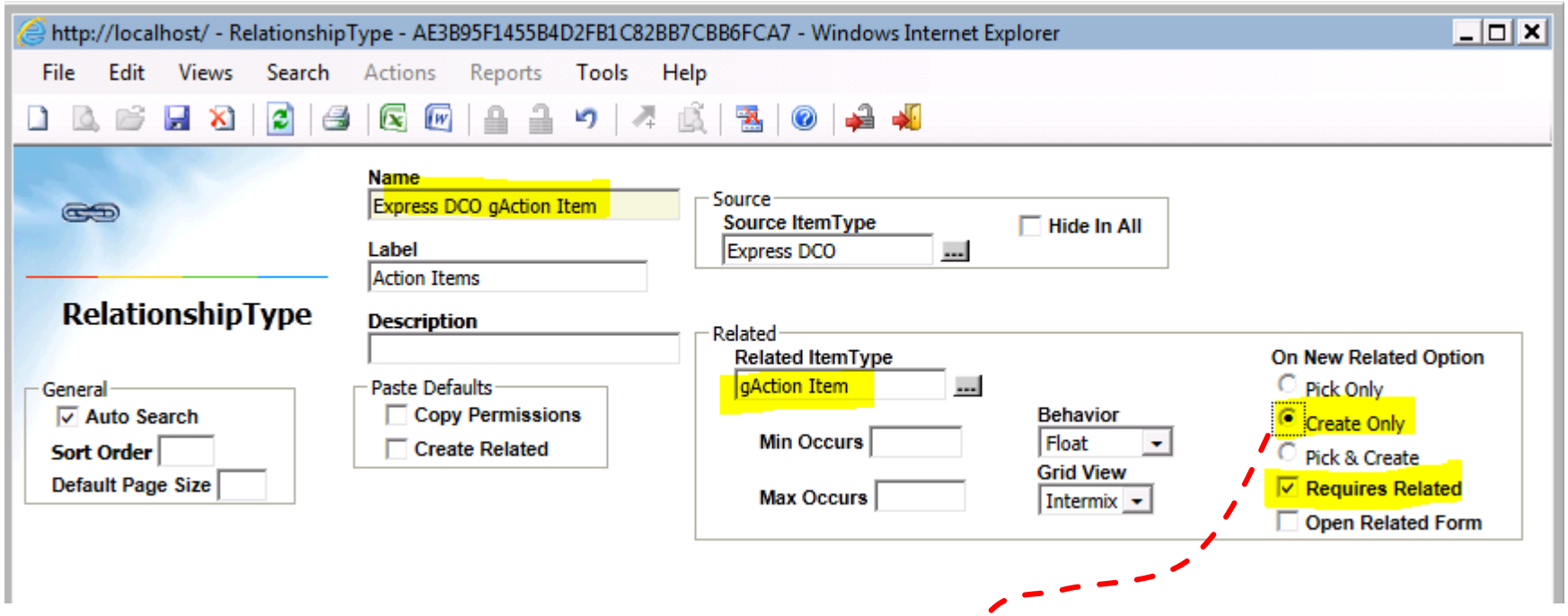
If set, instance of Action item will auto-promote to „Open“



Action Items Example on „Express DCO“



Example Configuration: Express DCO Action Item Tab



Must be set to alway create new relationship that must have a new related item.